



Memorandum

TO: COMMUNITY AND ECONOMIC
DEVELOPMENT COMMITTEE

FROM: Peter Jensen

SUBJECT: MEXICAN HERITAGE PLAZA
TRANSITION PROGRESS REPORT

DATE: June 5, 2009

Approved

Date

COUNCIL DISTRICT: District 5

RECOMMENDATION

Accept the staff report updating the CED Committee on the transition plan for the Mexican Heritage Plaza (MHP).

BACKGROUND

As of the last update to the CED Committee, the Hispanic Foundation of Silicon Valley (HFSV) and City staff have been actively engaged in raising financial support from the foundation community to cover the cost of the facilitator for the Mexican Heritage Plaza community business planning process.

A facilitator selection process led by the HFSV was completed in February and resulted in the selection of a leading contender for the position.

ANALYSIS

We are pleased to inform you that the funds to support the facilitated process have been raised. The attached letter from the Hispanic Foundation of Silicon Valley provides detail on the consortium of funders supporting this process, as well as the selected facilitator. As specified in the MOU between the City and the HFSV, HFSV will execute the contract with the facilitator and act as the fiscal agent of this process. City staff will provide support to the facilitator and will monitor the project milestones tied to scheduled payments to the facilitator.

The facilitator is currently coordinating with the Steering Committee members to determine the date for the first meeting. We anticipate that this orientation meeting will be held in July. Agenda items will include coordination of a permanent calendar of meetings, introduction of the work plan and timeline for completing project milestones, as well as a brief training on Brown Act requirements from the City Attorney's office.

COMMUNITY AND ECONOMIC DEVELOPMENT COMMITTEE

June 5, 2009

Subject: Mexican Heritage Plaza Transition

Page 2

EVALUATION AND FOLLOW-UP

Informational reports regarding all aspects of the MHP transition, as well as recommendations at needed decision points will be provided to the CED Committee and full Council as appropriate. The next scheduled update for the Committee will be in August 2009 and will include updates on the work of the Steering Committee.

PUBLIC OUTREACH/INTEREST

All meetings of the Steering Committee will be open to the public and publicly noticed. All community members who attended the public forums conducted by the Mayor and District 5 Council offices will receive an email announcing the kick-off of the process. This distribution list will also receive quarterly updates on the progress of the Committee.

The Committee has an official page on the City Clerk's website and the meeting details will be posted on the City's master calendar. The MHP website will be linked to both the Clerk's site and the master calendar and will continue to provide:

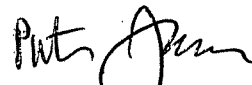
- Announcements for upcoming meetings of the Steering Committee
- On-line form to pledge membership to MHP
- Information on community meetings, consultant reports and Council and Committee meetings that have been completed to date regarding MHP
- Contact information to direct questions or comments regarding MHP and the business planning process

COORDINATION

This memorandum has been coordinated with the City Attorney's Office.

CEQA

Not applicable.



Peter Jensen
Director, General Services



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OF SILICON VALLEY

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Teresa Alvarado
Executive Director

June 5, 2009

Dear Madame Chair and members of the San Jose City Council
Community and Economic Development Committee:

The Hispanic Foundation of Silicon Valley (HFSV) is pleased to announce that we have raised the funding for the facilitator of the Mexican Heritage Plaza business planning process. Thanks to the financial commitment by the Packard Foundation, Hewlett Foundation and the Castellano Family Foundation, the facilitator has been hired and planning for the first Steering Committee meeting is underway.

The facilitator was selected through a Letters of Interest solicitation and a panel interview process lead by the Hispanic Foundation and supported by City of San Jose staff. We have selected the facilitation team of Laurie MacDougall and Juliana Grenzenback for this process. This highly-qualified and engaging team comes with significant experience in conducting strategic planning for arts and cultural organizations and communities, program and operations planning for new or existing cultural facilities, and financial analysis and business planning for arts and cultural organizations and facilities.

We have complete confidence in their ability to engage the Steering Committee and the community in a process that moves the Mexican Heritage Plaza toward a sustainable future. Their CVs and relevant project experience are attached.

The Hispanic Foundation of Silicon Valley will act as the fiscal agent for this process. City staff will manage the facilitated process and day-to-day consultant oversight. In addition, the individual donations collected in the form of pledges to the Plaza will be managed, without fees, by the Hispanic Foundation until December 2009, at which time the Steering Committee will make a recommendation to the HFSV about the best use of these funds.

The Hispanic Foundation looks forward to the educational and tangible outcomes that are expected to result from this process and we thank the City of San Jose for its leadership in establishing this important community effort. We wish the Steering Committee and facilitator team great success as they work together to understand the options and develop their recommendation for a business model which sets the framework for a financially-stable and vibrant community cultural resource.

Respectfully,

Teresa Alvarado, Executive Director
Hispanic Foundation of Silicon Valley

RELEVANT EXPERIENCE:

The following are projects facilitated either by Laurie MacDougall, by Juliana Grenzeback, or as a team:

- **Office of Cultural Affairs, City of San Jose.** MacDougall and Grenzeback worked together to conduct a process involving community input, leading to a feasibility study and business plan for a 500-seat theater owned/operated by the Center for Employment Training.
- **William and Flora Hewlett Foundation, James Irvine Foundation, McKnight Foundation, and the San Jose Office of Cultural Affairs.** At the request of a consortium of funders, MacDougall and Grenzeback conducted a complete assessment—financial and organizational—of the operations of San Jose Repertory Theatre to facilitate reorganization.
- **Mexican Heritage Corporation.** Grenzeback completed a financial analysis and pro formas for MHC prior to its opening that correctly predicted the financial difficulties that would confront MHP based on its original operating assumptions.
- **San Francisco Redevelopment Agency.** Grenzeback has worked with the Agency on the financial restructuring of Zeum and the Museum of the African Diaspora. Grenzeback also did financial projections for the Agency for the proposed Mexican Museum that tested the organization's operating pro formas and found them not to be realistically feasible.
- **East Bay Center for the Performing Arts.** MacDougall and Grenzeback both worked with this community-based organization to assess and strengthen its operations in order to undertake its facility project.
- **Center for the Arts/Yerba Buena Gardens.** The San Francisco Board of Supervisors required a management audit of YBCFA shortly before its opening. Both MacDougall and Grenzeback participated in the audit team.
- **Intersection for the Arts.** MacDougall and Grenzeback facilitated a planning process for this multi-disciplinary, multicultural arts facility that was on the verge of bankruptcy. By a strategic use of the assets of the facility to improve the income stream, the organization is thriving today.

For examples of work with culturally-specific arts and cultural organizations for both members of the proposed team, see individual resumes and client lists.

MacDougall & Company
306-C Lily Street, San Francisco, CA 94102
Phone: (415) 255-1104
Email: odduck@earthlink.net

WORK EXPERIENCE:

CURRENT

- *Independent Consultant* 6/88 to present
Management consulting and organizational development services to non-profit cultural organizations. In 2000 completed a study of the impact on arts organizations of the real estate boom in San Francisco. Areas of particular emphasis include: assessment of organizational capacity, strategic planning, financial management, facility planning, marketing and fund development. (See attached Client List for details.)

NATIONAL ENDOWMENT FOR THE ARTS

3/89 to 1996

- *Field Consultant for the Advancement Program*
Over a period of 8 years, worked with 30+ small- to mid-sized arts organizations nation-wide, providing needs assessment, technical assistance in any areas required, and facilitation of a long range strategic planning process suited to each group.

SAN FRANCISCO SYMPHONY

- *Director of Volunteer Activities* 8/86 to 6/88
Responsible for coordination of volunteer effort on behalf of the Symphony, raising over 2.7 million dollars in FY 86-87. Supervised full-time permanent staff of 3, with roster of 1,500 volunteers. Activities included gala benefits, the Black and White Ball, a thrift store, retail wine program and gift sales, a travel program and similar fundraising projects

- *Membership/Special Gifts Manager* 8/85 to 8/86
Responsible for raising over \$500,000 in FY 85/86 in corporate and individual gifts by means of direct mail, telemarketing and coordination of volunteer solicitation effort.

CABRILLO MUSIC FESTIVAL

- *Executive Director* 3/82 to 8/85
Full responsibility for administration and production of annual contemporary music festival, with year-round staff of 3 and seasonal staff of 16. In addition, produced U.S. premiere of Hans Werner Henze's opera, "The Adventures of Tom Thumb" in 1984.

- *Marketing and Public Relations Coordinator* 7/81 to 3/82
Responsible for marketing of tickets, promotion and public relations. Assisted in all other aspects of administration and production as needed.

ADVERTISING

- *Copywriter* 1964 to 1981
Worked for major New York advertising agencies as staff Copywriter, Copy Supervisor and Associate Creative Director and as free lance Marketing Consultant throughout this period. Clients included:
Clairol Chanel Monsanto Pantene
Nabisco Revlon Oneida Silver IBM

Time Magazine

General Foods

Simmons

Frito-Lay Co.

- *Instructor*

1976-1978

Designed curriculum and gave classes in marketing strategies, conceptualizing and writing copy for print and broadcast media at the School of Visual Arts, New York City

- *Awards*

CLIO for Best Cosmetic Commercial, 1966, for Clairol Cosmetics, "Blondes"

ANNY Award of Merit, 1972, Milk-Bone Dog Biscuits, Trade Ad Division

Copy Club Honorable Mention, 1981, Crouch & Fitzgerald, Retail Ad Division

Awards from the Cat Writers' Association of America:

Muse Medallion for Excellence (2005 and 2006)

Fort Dodge Responsible Healthcare for Pets Award (2005)

Hartz Everyday Chewable Vitamins Award (2005)

PUBLICATIONS:

Space for the Arts Study: Impact of the S.F. Real Estate Crisis on the Arts (2000)

Henry Cowell and His Family

Arts Manager's Toolbox: Fundraising

Marketing Planning and Other Exotic Quixotic Notions

WORKSHOPS AND SEMINARS CONDUCTED:

- One-day workshops on organizational planning, designing and conducting capital campaigns through the Cultural Facilities Fund, 1997-2003
- Capital Campaign Intensive Workshops for Cultural Facilities Fund, 1997-2003
- Audience Development Intensive Workshops for Poets & Writers, 1997
- Intensive Marketing Seminar for annual conference of the National Guild of Community Schools of the Arts, 1993
- Advancement Consultant Training in Marketing and Public Relations, 1992/93 and 1993/94
- Advancement Participants Training in Marketing and Public Relations, 1993/94

BOARD OF DIRECTORS MEMBERSHIPS:

Hospice/Caring Project of Santa Cruz County (5 years)

Cultural Council of Santa Cruz County (2 years)

Rosen Institute (2 years)

Kitka Eastern European Women's Chorus (2 years)

EDUCATION:

B.A. in English from University of California at Berkeley, 1962

JULIANA GRENZEBACK
135 COLERIDGE STREET
SAN FRANCISCO, CA 94110
TEL: 415-285-8387 FAX: 415-970-8910
EMAIL: JHGREN@EARTHLINK.NET

BACKGROUND: Senior management finance professional with over 20 years of non-profit experience.

RECENT EXPERIENCE:

Non-Profit Consultant, Various clients. See attached client list. 1995 to 2003, 2005 to present
Provide consulting services in business planning, facilities planning and financial management for nonprofit organizations.

Director of Finance and Administration, Yerba Buena Center for the Arts 2003 to 2005

Responsibilities:

- Served as chief financial officer of the organization
- Responsible for all financial aspects of the organization, including: planning, budgeting, and reporting
- Oversaw management of the investment portfolio
- Worked with Finance and Audit Committees of the Board
- Full responsibility for accounting, administration and information technology departments, supervising seven staff positions
- Liaison to San Francisco Redevelopment Agency
- Contract administration
- Responsible for insurance, risk management and legal compliance with all local, state, federal non-profit requirements

Key achievements:

- Spearheaded reorganization that eliminated eight staff positions to turn a projected \$1 million deficit into a break-even budget
- Regularly served as Acting Executive Director when the Executive Director was gone for extended periods
- Served as Interim Facilities Manager
- Revised and updated financial and investment policies
- Streamlined accounting procedures to enable a staff of two to accomplish what had previously required a staff of four
- Managed, supervised and implemented installation of new accounting software
- Project manager for major database conversion that integrated ticketing and fundraising functions into one software system
- Played a major role in negotiating a new operating agreement with San Francisco Redevelopment Agency
- Reduced organization unemployment costs by 50% in partnership with Human Resources Director
- Led a strategic planning task force as part of an organization-wide planning effort

**Program Coordinator, Cultural Facilities Fund/SF Bay Area Program
(now the Nonprofit Facilities Fund)**

1994 to 1995

Responsibilities:

- Implemented technical assistance and financial assistance program to assist nonprofit arts organizations plan, implement and maintain facilities projects located in six Bay Area counties
- Developed and presented workshops
- Consulted with individual groups
- Administered a loan program with assets of \$1.1 million
- Administered planning grant program

Key Achievements:

- Founding director of first regional office for new national program
- Co-designed the program, workshops and technical delivery systems
- Developed guidelines for planning grant program
- Created subsidized consulting program
- Designed basic procedures and policies for the program
- Established first Advisory Board for the Bay Area Program

Business Manager, El Teatro Campesino, San Juan Bautista, CA.

1993 to 1994

Responsible for all financial aspects of theatre company with budget of \$900,000, including financial systems, box office, and budgeting. Supervised staff of three and reported directly to Board of Directors. Developed recommendations for reorganization plan to alleviate/restructure debt, including staff restructuring; cost controls; improved reporting/tracking systems.

Program Manager/Business Manager, Melanie Beene and Associates

1990 to 1993

Responsible for all administrative aspects of \$3.275 million Cooperative Agreement with National Endowment for the Arts' Advancement Program. Developed and maintained all accounting and tracking systems; developed and produced conferences; researched, wrote and edited publications, including *Arts Manager's Financial Management Toolbox*. Provided technical assistance consulting to field consultants and financial management consulting to participating organizations. Read and critiqued organizational long range plans.

PREVIOUS EXPERIENCE:

Development Director, City Celebration, Inc; (now World Arts West)

1988 to 1990

Administrator, Young Audiences of the Bay Area

1984 to 1987

Producing Director, Bay Area Theatresports

1986 to 1987

Stage Manager, Costumer/Wardrobe Supervisor, Various productions

1983 to 1989

EDUCATION:

M.B.A., Golden Gate University, San Francisco. 1991. Outstanding Student Award.

B.S., Business Administration, emphases in Finance, International Business. University of San Francisco. 1982. Magna cum laude.

Diploma, Intensive Spanish Language Course, Intermediate and Advanced levels. Colegio de Espana, Salamanca, Spain, 1983.

WORKSHOPS:

Presenter: "Dough Re Mi: Building Blocks of Financial Management." Workshop for annual conference of National Guild of Community Schools of the Arts. Los Angeles, CA.

Presenter: "Board Fiscal Responsibility." Workshop for Management Assistance Program of the Community Foundation of Santa Cruz County.

Presenter: "Telling the Story of Your Organization Through Numbers: Budgeting for Nonprofits." Workshop for Management Assistance Program of the Community Foundation of Santa Cruz County.

Lecturer: Financial Management Session, "Fundamentals of Arts Administration" Class. Golden Gate University, San Francisco, CA.

Presenter: "Building a Cultural Facility: Are You Ready for the Challenge?" San Diego Art Commission Workshop Series, San Diego, CA.

Presenter: "Financial Management Seminar." NEA Advancement Program Participants Conference, Washington, D.C.

Co-Presenter: "Financial Management Seminar", with Melanie Beene. Tucson/Pima Arts Council, Tucson, AZ

Co-Presenter: "Managing Arts Organizations in Economic Crisis", with M. Beene. Winter Institute, Association of Performing Arts Presenters, New York, NY.

PUBLICATIONS:

Author: *"Converting the Enemy: Budgeting During Planning."* An article included in ***Lessons Learned: A Planning Toolsite for the Worldwide Web***, part of the NEA's website.

Author: ***Arts Manager's Toolbox - Personnel Management***.

Author: ***Arts Manager's Toolbox - Financial Management***, original and revised editions.

Editor: ***Arts Manager's Toolbox – Fundraising: Individuals, Small Businesses and Special Events***

Author: ***Fear and Loathing in Financial Management: Overcoming Analysis Aversion in Small Nonprofit Arts Organizations***. Thesis for M.B.A.

PANELS:

Panelist, Cultural Equity Initiative Program Level 1, San Francisco Art Commission, San Francisco, CA.

Panelist, Developing Arts Organizations, Resident Arts Organizations Grants Panels. Office of Cultural Affairs, City of San Jose.

Panelist, Creative Space Grant Program, Cultural Equity Endowment, San Francisco Art Commission, San Francisco, CA.

Panelist, Presenters Expansion Program, Chamber Music America. New York, NY.

ADDITIONAL INFORMATION:

2004 - 2006 Member, Finance Council, St. Boniface Church

2003 - Present Volunteer, The Living Room, St. Anthony's Foundation

2001 - 2004 Volunteer, Tenderloin Opera Company.

2001 Volunteer, Planned Parenthood Golden Gate.

1992 - 1994 Treasurer, Board of Directors, Small Press Distribution.

1992 Member, Board of Directors, MHR Support Group (Support services for persons with HIV).

1988-1989 Treasurer, Board of Directors, Theatre Flamenco.

REFERENCES: Available on request.

JULIANA GRENZEBACK
135 COLERIDGE STREET
SAN FRANCISCO, CA 94110
(415) 285-8387
EMAIL: JHGREN@EARTHLINK.NET

PARTIAL CLIENT LIST (former and current) As of January 2007.
Unless otherwise indicated, groups are located in San Francisco.

Business Planning

Djerassi Resident Artists Program (Woodside, CA) (*Long range planning*)
Intersection for the Arts (*Plan for reorganization. With Laurie MacDougall*)
Community Foundation of Santa Cruz County and Santa Cruz County Cultural Council (Santa Cruz County, CA) (*Needs assessment for County Cultural Plan. With L. MacDougall*)
Cultural Council of Santa Cruz County (*Financial analysis and projection for strategic plan*)
New Orleans Jazz and Heritage Foundation (New Orleans, LA) (*Long range planning. With Terry & Associates.*)
Nonprofit Finance Fund: Jazznet Groups (*Planning, financial management*)
New Orleans Jazz & Heritage Foundation (New Orleans, LA)
Contemporary Arts Center (New Orleans, LA)
Outpost Productions (Albuquerque, NM)
Thelonius Monk Institute (Washington, DC; Los Angeles, CA)
Tri-C JazzFest (Cleveland, OH)
Office of Cultural Affairs, City of San Jose (San Jose, CA) (*Feasibility study and business plan for 500-seat theatre owned/operated by Center for Employment Training*)
San Francisco Redevelopment Agency: Zeum and Museum of the African Diaspora (MOAD) (*Restructuring Organizations*)
Social and Public Art Resource Center (as part of Ford Foundation's Working Capital Fund) (Venice, CA) (*Business planning*)
YWCA, San Francisco (*Financial planning for restructuring organization with four satellite programs*)

Facilities Planning

Cultural Facilities Fund/Philadelphia Program (Philadelphia, PA) (*Facility Planning needs assessment of nonprofit groups in greater Philadelphia area*)
Cultural Facilities Fund/SF Bay Area Program: Facility Planning Needs Assessment for the David & Lucile Packard Foundation
Cultural Facilities Fund/SF Bay Area Program: Ariel Theatre (Salinas, CA) (*Financial projections for project and pro forma operating budgets for proposed children's theatre*)
Cultural Facilities Fund/SF Bay Area Program: Various organizations (*Assessment /review with various organizations embarking on facilities projects*)
East Bay Center for the Performing Arts (Richmond, CA) (*Organizational assessment to determine readiness to take on proposed building renovation project*)
Film Institute of Northern California (Mill Valley, CA) (*Analysis of Capital Campaign Financing Options. With Laurie MacDougall*)
Gilroy Cultural Center (Gilroy, CA) (*Financial pro formas for three facility options. With Laurie MacDougall*)
Kala Art Institute (Berkely, CA) (*Financial Assessment, projections for new facility. With Laurie MacDougall*)
Human Resources Agency of Santa Cruz County (Santa Cruz, CA) (*Co-location study of social service organizations in Santa Cruz county. With Laurie MacDougall*)
The Marsh (*Financial Analysis of impact of facility purchase and debt financing*)
Mexican Heritage Corporation (San Jose, CA) (*Financial Analysis, Projections for New Facility*)

San Francisco Redevelopment Agency: Mexican Museum (*Financial assessment of Space for the Arts Study – with Laurie MacDougall (Research coordinator for study documenting space crisis for nonprofits in San Francisco)*)
Sutton and Associates: Gallo Center for the Performing Arts (Modesto, CA) (*Research on comparable facilities*)

Financial Analysis/Projection

Cultural Facilities Fund/SF Bay Area Program (*Financial Analysis of loan/grant applications*)
Harlem School of the Arts (New York, NY) (*Assistance with budgeting*)
MacDougall and Associates: Thick Description (*Financial Assessment*)
Melanie Beene & Associates: Evaluation of Silicon Valley Arts Fund (*Financial Analysis*)
Melanie Beene & Associates: Management Assessment of Center for the Arts, Yerba Buena Center (*Financial Analysis*)
New Langton Arts (*Financial Analysis, Cash Flow Projections*)
San Francisco Redevelopment Agency: Zeum (*Multi-year budget projections. Financial implications of restructuring*)
Terry and Associates: Boys Choir of Harlem (New York, NY) (*Financial Analysis*)
William and Flora Hewlett Foundation (*Financial Assessment of Foundation grantee*)
Zeum (*Review of Pro Forma Financial Projections for New Facility*)

Financial Management Systems: Assessment/Upgrade/Training

Arte Americas (Fresno, CA)
Alonzo King's Lines Ballet
Beyond Baroque Foundation (Venice, CA)
Black Filmmakers Hall of Fame (Oakland, CA)
Cabrillo College Foundation (Aptos, CA)
Calyx (Corvallis, OR)
Camera News/Third World Newsreel (New York, NY)
Community Foundation Silicon Valley (San Jose, CA)
Crowden Music Center (Berkeley, CA)
CenterCultural Council of Santa Cruz County (Aptos, CA)
Falkirk Cultural Center (San Rafael, CA)
Galeria de la Raza
Hartnell College Foundation (Salinas, CA)

organization in relation to plans for new facility)

Hayward Area Historical Society (Hayward, CA)
Headlands Center for the Arts (Sausalito, CA)
Jazz in the City/San Francisco Jazz Festival
National Educational Film and Video Festival (Oakland, CA)
National Institute of Art and Disabilities (Richmond, CA)
Other Minds, Inc.
Pajaro Valley Arts Council (Watsonville, CA)
Poets House (New York, NY)
Ragazzi Boys Chorus (San Mateo, CA)
Richmond Art Center (Richmond, CA)
San Francisco Cinematheque
San Francisco Redevelopment Agency: Zeum
Small Press Distribution (Berkeley, CA)
Very Special Arts New Mexico (Albuquerque, NM)
Young Audiences of the Bay Area

Financial Management

Cabrillo College Foundation (Aptos, CA)
Community Foundation of Santa Cruz County (Soquel, CA)
The Fleishhacker Foundation
Galeria de la Raza
Joe Goode Performance Group
Pajaro Valley Performing Arts Association (Watsonville, CA)
Performing Arts Library and Museum
San Jose Taiko (San Jose, CA)
Small Press Distribution (Berkeley, CA)
Streetside Stories

Other

Alliance of Artists' Communities (Sausalito, CA) (*Program Coordination*)
Arthouse: California Lawyers for the Arts (*Survey of technical assistance services*)
Boyer House Foundation (San Rafael, CA) (*Staffing assessment, financial assessment, budgeting*)
David and Lucile Packard Foundation (Menlo Park, CA) (*Analysis of Grantee data*)
James Irvine Foundation (*Provide financial assessment and consultation for selected grantees*)

Ketchikan Arts and Humanities Council (Ketchikan, AK) (*Fiscal sponsorship program redesign; financial software upgrade*)

Nonprofit Finance Fund (Philadelphia, PA) (*Grant application review, analysis/recommendations for Prudential Anniversary Fund*)

Outpost Productions (Albuquerque, NM) (*staffing assessment*)

MacDougall and Associates/Rasmuson Foundation (Anchorage, AK) (*Consultant for Organizational Advancement Initiative Pilot Program, working with three organizations*)